

**SOUTH DAKOTA BOARD OF REGENTS**

**Academic and Student Affairs**

**AGENDA ITEM: 5 – D**  
**DATE: October 2-4, 2018**

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**SUBJECT**

**Banner Implementation Update**

**CONTROLLING STATUTE, RULE, OR POLICY**

[BOR Policy 1:1](#) – General Authority, Powers, and Purpose of the Board <sup>1</sup>

[BOR Policy 1:7:6](#) – Technology and Telecommunications Council <sup>2</sup>

**BACKGROUND / DISCUSSION**

In 2017, the Board of Regents approved both a Banner Version Upgrade for HR and Finance and a Banner Student and Financial Aid Implementation. Over the past year, the system stakeholders assigned to this project have been working toward the implementation of such technology upgrades.

**IMPACT AND RECOMMENDATIONS**

System personnel continue to pursue the established timeline with commitment toward success from both Ellucian and the Regental system. As with any implementation of this magnitude, there is a desire to have a complete utopia – meaning no challenges, no opportunity for change management, and no resource constraints. However, with any technology project implemented there are and will be challenges. It is that focus for resolution from key staff across the system that continues to serve the Board. This implementation is no different.

There have been difficulties, opportunities to grow and learn, change management required and needed synergies across either the system or internal to functional core teams. There is a need to come to consensus, make decisions, find solutions and move forward timely. At the end, the goal is to have a system to move past the day-to-day operational aspects of an information system to that of foundational transformation. This means the need to use data for not only information but strategy and decision-making, by having efficiencies based on the use of data. This does not occur in a vacuum and requires a significant amount of work (the bulk of which is to migrate from the legacy Colleague system to that of Banner). The teams continue to press forward knowing that this is not an easy task and

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<sup>1</sup> Policy 1:1 outlines the constitutional authority the Board of Regents has to govern the University system. This governance includes full power, responsibility, and authority to supervise, coordinate, manage and regulate.

<sup>2</sup> Policy 1:7:6 outlines the goal to incorporate technology systems as outlined by the Board of Regents.

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**INFORMATIONAL ITEM**

while there are challenges, all are working diligently to arrive at the outcome of the implementation.

HRFIS – Human Resource/Finance Version Upgrade.

To date the HR and Finance teams have had two major go-live dates (referenced below) for the version upgrade which included Luminis the portal to Banner and the Banner 9 upgrade, which have each been successful.

Luminis (Portal to Banner)	July 21, 2018
HRFIS Banner 9	August 3-6, 2018

Ellucian provided two additional technical resources to complete these upgrades in July and August. There continue to be a number of residual items that the teams are working through including training, documentation updates, report updates, technical patches for both Luminis and HRFIS Banner 9. Overall, this portion of the technology updates are moving forward with limited challenges. The major timelines have been implemented and now there will be maintenance and follow-up performed by various functional and technical staff.

SISFA – Student Information System and Financial Aid Implementation.

The timeline commitments for implementing SISFA include:

General Person	October 15, 2018
Financial Aid New Year Roll Deployment	October 22, 2018
Financial Aid Applications Deployment	November 5, 2018
General Student Deployment	January 19, 2019
Application Integration Phase I Deployment	January 19, 2019
Admissions Banner Deployment	January 22, 2019
Financial Aid Awarding Deployment	January 28, 2019
CRM Application Deployment	March 1, 2019
Summer/Fall Registration Deployment	March 15, 2019
Academic Affairs/Student Affairs Deployment	May 1, 2019
Accounts Receivable Deployment	May 1, 2019
Financial Aid Disbursements/COD Originations	May 6, 2019
DegreeWorks Deployment	August 19, 2019

There are several strategies being executed to be successful on this timeline. While the timeline is compacted, the following progression plans have been implemented by Ellucian and SD toward successful completion to remain on schedule and within budget. The goal of both Ellucian and SD continues to pursue the intended go-live schedule as outlined.

1. Additional Resources by Ellucian:

To be successful,

- Ellucian has provided a full-time Data Migration Consultant.
- Ellucian has provided technical and project consultant staff to find solutions to any opportunity provided.
- Ellucian holds calls with core Ellucian staff, project management and technical stakeholders 5x a week with SD.
- Ellucian has accommodated additional data migration/conversion rounds and additional data mining to assist in the conversion of Colleague data to Banner.
- Ellucian continues to provide a milestone timeline with additional resources to meet those objectives.

2. SD Focused Teams:

To be successful (SD may mean regents staff, campus staff, or a combination thereof),

- SD has moved from training several stakeholders to creating a more focus group review on migration and data mapping. Assignments have been provided to core areas in the system to avoid duplication of effort and the use of resources efficiently.
- SD has implemented several functional and technical meetings to discuss project status, cross-functional needs, and overall jeopardies, risks, issues to increase focus on resolution and increase communications.
- SD has created outlined tasks and objectives by the go-live dates to ensure that the go-live for 10/15 and 11/5 are successful in the short term and all of the long-term 2019 go live dates.
- SD has initiated several meetings with key staff to identify training needs for all stakeholders in the system: students, key department staff, super user staff, and those key functional end-users of Banner at the campuses
- SD has initiated discussions with all teams to start documenting their training need via manuals, reference guides, computer based training, PowerPoint training, and frequently asked questions etc.
- SD has now worked with their reporting and technical teams on critical integration of third parties and reporting needs. These key/critical items will be assigned timelines for specification, development and implementation. This will be managed by both the campuses for their third party needs and the Regents Information Systems for any central integration or reporting.

3. Communication:

During a project of this vast size, communication cannot be overstated. As the complexity and number of stakeholders increase there has been a need to modify some of the communication strategies.

- Updates to Councils: The schedule of Council meetings to major decision needs and timing may not always fit. Therefore, AAC will start to hold more regular

calls just on the topic of Banner. As Academic Affairs are the sponsors to this project this may increase communication at the VP level. Where other councils are not meeting as regular, SD has requested pop-up calls to provide updates to the councils as requested by SD or the council.

- **Email Updates:** Weekly email updates are provided on some of the critical decisions made or schedule changes or overall policy/procedure or technical needs. These emails serve as a good source to provide highlights of the project.
- **Steering Committee and Campus Project Managers:** Due to the amount of discussion occurring at the Steering Committee SD has now added the Campus Project Managers. This is to facilitate continual communication between functional departments, at the campus and across the system. These meetings are scheduled monthly.
- **Additional monthly meetings** are held with the Campus Project Managers to follow up on the Steering Committee items and needs of the project to reinforce active communication between the campuses, system office, across functional and technical areas, etc.

This is an informational update on the status of the Student Banner Project. It will be critical for SD to stay on track for our SISFA go-live schedule as outlined above. To create a more managed go-live schedule, SD teams have developed and worked to implement a phased approach. This assists each team to stay focused on the go-live dates as they approach in a more meaningful and manageable implementation. SD is leaning on this strategy to be on time, within budget and to mitigate additional costs.

## **ATTACHMENTS**

None